

## Guidelines for Lab-wide Document Creation or Revisions

### Process for New Lab-wide Documents

1. Determine document type
2. Send email request for document number to [doccontrol@ameslab.gov](mailto:doccontrol@ameslab.gov)
3. For forms, determine whether document requires bar code (consult with Rhonda DeShong at 4-0931)
4. Choose appropriate [document template](#)
5. Complete [document submission form](#)
6. Send document and submission form to [doccontrol@ameslab.gov](mailto:doccontrol@ameslab.gov)
7. Make any necessary revisions after document has been reviewed by Document Control staff

### Process for Major Revisions of Lab-wide Documents

1. Verify revision number with Document Control staff to ensure database accuracy
2. Make any formatting changes necessary to match the Lab's document template
3. Complete [submission form](#) and update revision description
4. Send document and submission form to [doccontrol@ameslab.gov](mailto:doccontrol@ameslab.gov) (do not need to send revision description; this information should be included in the submission form)
5. Make any necessary revisions after document has been reviewed by Document Control staff

### General Document Guidelines

1. Follow the appropriate document template
  - a. Arial, 11-pt font
  - b. Approval record instead of Sign-off Record
  - c. Revision description information instead of revision/review log
2. Use recommended approval routing
  - a. Plans/Policies/Charters: Entire Executive Council
  - b. Manuals/Procedures: Member of Executive Council having oversight
  - c. Forms/Trainings/Handouts/Guides: *Reviewed* by supervisor or program manager
3. Minor revisions do not require approval routing, but still need a submission form and revision description

## Revision Timelines and Approval Guidelines

<i><b>Document Type</b></i>	<i><b>Revision Timeline</b></i>	<i><b>Approval Guideline</b></i>
<b>Charter</b>	3 years maximum	Approval of Program Director/Department Manager and all of Executive Council
<b>Form</b>	5 years maximum	No approval necessary; must be <i>reviewed</i> by Program Director/Department Manager
<b>Guide</b>	5 years maximum	No approval necessary; must be <i>reviewed</i> by Program Director/Department Manager
<b>Handbook/Handout</b>	5 years maximum	No approval necessary; must be <i>reviewed</i> by Program Director/Department Manager
<b>Manual</b>	3 years maximum	Approval of Program Director/Department Manager and the member of Executive Council having oversight of the originating program area
<b>Plan</b>	3 years maximum	Approval of Program Director/Department Manager and all of Executive Council
<b>Policy</b>	3 years maximum	Approval of Program Director/Department Manager and all of Executive Council
<b>Procedure</b>	3 years maximum	Approval of Program Director/Department Manager and the member of Executive Council having oversight of the originating program area

NOTE: Minor revisions do not require approval routing, but still need a submission form and revision description.

